

Edison Course Offerings Summary

Financials / Supply Chain Management

(Beginning August 2008)

All Core Users – Navigation

Navigation Web

Asset Management

Adding Assets & Maintaining Asset Physical Information	Classroom
Physical Inventory	Classroom
Asset Disposals	Classroom

Accounts Payable

Voucher Entry	Classroom
Pcard Reconciliation	CBT
Pcard Administration	Web
Approving a Voucher	Web

Accounts Receivable/Billing

Enterprise Billing	Classroom
Accounts Receivable Foundation	Classroom
Accounts Receivable Advanced Topics	Classroom

Budget Control

Budget Journal Administration	Classroom
Budget Inquiry & Analysis	Classroom

Cashiering

Basic Training – Cashiering	Classroom
Supervisor Training – Cashiering	Classroom

Fleet Management

Fleet Management	Classroom
Advanced Fleet Management	Classroom
Inventory Management	Classroom
Sign Shop Management	Classroom
Motor Pool Management	Classroom

Basic Fleet Navigation	Web
Work Order & Fuel Management	Classroom
Equipment Timesheets	Web
Mechanic's Handbook	Web

General Ledger

Journal Entry – Foundation	Classroom
Journal Entry – Advanced	Classroom
Understanding Chartfields	Web

Grants

Grants Management & Administration	Classroom
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Inventory

Basic Order Fulfillment	Classroom
Inventory Receiving	Classroom
Inventory Management	Classroom
Using a Bar Code Scanner	Classroom

Plant

Work Management Processing	Classroom
Project Management & Administration	Classroom
Contract Management	Classroom
Assets, Equipment & Preventative Maintenance	Classroom
Property & Lease Administration	Classroom
Finance & Purchasing	Classroom
Estimating	Classroom
Utility Management	Classroom
Customer Request	Web
Introduction to FacilityMAX	Web
Plant Inventory	Classroom

Projects

Creating and Managing Projects & Activities	Classroom
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Procurement – Contracts

Supplier Contract Management	Classroom
Working with Ad Hoc Documents	Web

Procurement

Requisitioning and Receiving	CBT
Advanced Requisitioning	Classroom
Buyer Requisitioning	Classroom
Core Purchase Orders	Classroom
Receipts / RMA / RTV	Classroom
Requisitions & Purchase Order Approvers	Web
PO Rollover	Classroom
Services Procurement	Classroom
SPro for Vendors	Web
Strategic Sourcing	Classroom
eSupplier Training	Web

Reporting & Agency Technical Support

Running Existing Reports & Queries	Web
Agency Technical Support	Classroom

Travel & Expenses

Working with Travel, Expenses & Car Reservations	CBT
Travel Administration	Classroom

Note: For further course details refer to pages 4 through 36.

- ALL CORE USERS – NAVIGATION -

Course Name: Navigation – NAV99

Course Delivery: Web

Course Duration: N/A

Course Description: This course is designed for all Edison users and is a pre-requisite for all courses.

Navigation training will include an introduction to the Edison system in addition to basic instruction on how to navigate within the system.

Prerequisites: None

Recommended Audience:

- All users

- ASSET MANAGEMENT -

Course Name: Adding Assets & Maintaining Physical Information – AM1

Course Delivery: Classroom

Course Duration: ½ Day (Nashville Only)

Course Description: Learn how to use the Edison System to manually add assets, manage physical information on assets, dispose of assets and run asset management reports.

Maintaining assets includes tracking physical and warranty information on assets, documenting repairs, and printing the asset record. A Disposal worksheet is used to retire or dispose of an asset. This course will also demonstrate how to run asset reports.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- Fixed Asset Accountants
- Financial Accountants
- Asset Warranty/Location Managers

Course Name: Physical Inventory – AM3

Course Delivery: Classroom

Course Duration: 1/2 Day (Nashville Only)

Course Description: This course covers the transactions used to set up, process, and review a physical count of assets.

Users will learn how to define and schedule a physical inventory count and how to run the physical inventory process in Edison. They will also learn how to use hand-held scanners to record a physical count and to upload scanned data into Edison.

Additionally, users will learn how to reconcile duplicate tags and serial numbers, and how to generate transactions from inventory results.

Prerequisites: Navigation-NAV99

Recommended Audience:

- Property Officers

Course Name: Asset Disposals – AM4

Course Delivery: Classroom

Course Duration: ½ Day

Course Description: This course deals with the transactions used to dispose of, or retire, assets. It also considers how to reinstate a previously disposed asset.

Users will learn how to mark an asset as surplus and how to use a disposal worksheet to submit assets for retirement. The user will use Edison to retire assets, as well as, learn how to approve asset retirements submitted from disposal worksheets.

Users will also learn how to use the functionality to reinstate an asset that has been previously retired.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- Property Managers
- Property Officers
- Surplus Officers
- Financial Accountants

- ACCOUNTS PAYABLE -

Course Name: Voucher Entry – AP1

Course Delivery: Classroom

Course Duration: 1 day

Course Description: This course will provide information on how to understand, create, and correct vouchers, as well as perform inquiries on vouchers.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience: Accounts Payable Clerks, Voucher Maintenance

Course Name: P-Card Administration – AP6

Course Delivery: Web

Course Duration: N/A

Course Description: This course will provide information on how to maintain PCards, process bank files, send reminders, and route transactions for payments.

Users will learn how to manage the following:

1. Maintain PCards - define cardholder profiles, assign proxies to a cardholder, assign cards to a proxy, and select preferred vendors.
2. Process Bank Files - Load Procard stage and statements, correct errors, and send notifications.
3. Send Reminders - Run queries, and send notifications.
4. Route transactions for payment - Complete a final review and load transactions for payment processing.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- Agency P-Card Administrator
- P-Card Administrator
- P-Card Approver

Course Name: P-Card Reconciliation – AP7

Course Delivery: CBT

Course Duration: N/A

Course Description: This course provides information on how to verify and approve P-Card transactions, as well as, how to print transaction detail reports.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- Agency P-Card Administrator
- P-Card Administrator
- P-Card Approver
- P-Card Holder

Course Name: Approving a Voucher – AP8

Course Delivery: Web

Course Duration: N/A

Course Description: This online course targets the agency Human Resources staff and Department of Human Resources staff who approve pre-audit, post-audit, wire, and journal vouchers.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4, Voucher Entry-AP1

Recommended Audience:

- AP Agency Approver
- AP Fiscal Director or designee
- Division of Accounts Pre-Audit
- Division of Accounts General Ledger
- Director of Cash Management
- Director of Statewide Accounting
- Wire Room Approver

- ACCOUNTS RECEIVABLE / BILLING -

Course Name: Enterprise Billing – BI1

Course Delivery: Classroom

Course Duration: 1 Day

Course Description: This course demonstrates how agency personnel will use the Edison system to enter and manage billing information.

The course begins with a general overview of customers. The next two lessons cover how billing information is brought into Edison via online entry and/or via the billing interface. Workflow processes used to approve bills, generate invoices for consolidated and non-consolidated bills, adjust bills and bill lines will also be included. Finally, the course demonstrates the various ways that billing information can be viewed in Edison and how to run billing reports.

Prerequisites: Navigation-NAV99

Recommended Audience:

- Insurance Prepares
- AR-Billing Specialist
- AR-Billing Supervisor
- AR-Billing Approver

Course Name: Accounts Receivable Foundation – AR1

Course Delivery: Classroom

Course Duration: 2 Days

Course Description: This course provides an introduction to how agency personnel will use the Edison system to enter and track receivables.

The course begins with overviews of accounts receivable and customers. Next, it introduces how to enter pending items online and several different methods of entering deposits—i.e. regular deposit entry, express entry, and direct journal entry. This course also covers how payment worksheets can be used to apply payments to items; and how maintenance and transfer worksheets can be used to off-set, write-off, and/or transfer items. Additionally, the course covers how to assign actions and conversations to items, change an item's due date, and approve transactions using the Worklist. Finally, the course covers how to view/research an item, deposit, payment and customer account information.

Prerequisites: Navigation-NAV99

Recommended Audience:

- AR Specialist
- AR Collector
- AR Supervisor
- AR Approver
- AR Inquiry

Course Name: Accounts Receivable Advanced Topics – AR2

Course Delivery: Classroom

Course Duration: ½ Day

Course Description: This course covers advanced Accounts Receivable functionality. Specific topics will include running AR processes, collections, understanding account aging, correcting errors, and processing and printing dunning letters and customer statements. Some basic AR configuration tasks are also covered in this course, e.g. setting up standard notes, and add/editing AR Specialists and Collectors.

Prerequisites: Navigation-NAV99, Accounts Receivable Foundation-AR1

Recommended Audience:

- AR Collectors
- AR Supervisors

- BUDGET CONTROL -

Course Name: Budget Journal Administration – BC1

Course Delivery: Classroom

Course Duration: 1 Day

Course Description: This course will provide a conceptual understanding of how the budgets work and how to utilize various budget functions.

1. **Conceptual Overview of Budgets**
Learn how budgets are organized within Edison.
2. **Budget Journals**
How to create, post, unpost, copy and delete a budget journal.
3. **Budget Transfers**
How to create, post, and delete a budget transfer.
4. **Inquiry**
How to inquiry on budget transactions

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- Budget Analyst
- Budget Coordinator
- Budget Manager
- Fiscal Director

Course Name: Budget Inquiry & Analysis – BC2

Course Delivery: Classroom

Course Duration: ½ Day

Course Description: This course will provide a conceptual understanding of how the budgets operate and how to utilize various advanced budget functions.

- 1. Conceptual Overview of Budgets**
Learn how budgets are organized within Edison.
- 2. Loading Budgets**
Learn how to load budgets from outside of Edison.
- 3. Reporting**
Learn how to run reports that will aid in review and analysis of budgetary transactions.
- 4. Inquiry**
Learn how to inquiry on budget transactions.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

Various Budgetary Employees

- CASHIERING -

Course Name: Basic Training – Cashiering – CS1

Course Delivery: Classroom

Course Duration: 1 ½ Days

Course Description: This course will introduce the cashiers to basic functions within iNovah including: processing payments, adjusting transactions, balancing batches, multiple tenders, and a thorough overview of the cashiering system as it pertains to a user with basic permissions. This course should be taken by both cashiers and supervisors.

Prerequisites: None

Recommended Audience: All individuals that are involved in receiving money for their respective agency including:

- Front-line cashiers
- Supervisors
- “Back office” staff that will be receiving/processing revenue (including in person and by mail)

Course Name: Supervisor Training – Cashiering – CS2

Course Delivery: Classroom

Course Duration: ½ Day

Course Description: The Supervisor Training Cashiering course includes information on managing batch processes including: approving, rejecting, and reopening batches, performing tender pickups, and creating consolidated deposits. Supervisors learn how to enter deposit information into Edison, and how to review high-level reports and queries.

Prerequisites: Basic Training – Cashiering-CS1

Recommended Audience:

- Recommended for individuals with responsibilities pertaining to supervising cashiers, depositing money, or financial transaction reports.

- FLEET MANAGEMENT -

Course Name: Fleet Management – FM1

Course Delivery: Classroom

Course Duration: 2 Days

Course Description: The Fleet Management course focuses on asset management, inventory management, work orders and requests, maintaining employees and running reports. In the Asset Management lesson, you learn how to add new units, update unit information, put a unit into service, enter commuter usage, and manage operator assignments. An overview of the integration points between PeopleSoft Assets module and FleetFocus M5 Assets module will also be reviewed. In Inventory Management, learn how to: approve part requisitions, return parts, approve returned parts, and view the part catalog. An overview of the integration points between PeopleSoft Inventory module and FleetFocus M5 Inventory module will also be reviewed. In the Work Orders and Work Requests lesson, you learn how to create, update, and close work orders/requests and to run queries. The Maintaining Employees lesson focuses viewing employee information, correcting and approving employee labor timecards and how to enter labor into the timecard.

Prerequisites: Basic Fleet Navigation-FM6

Recommended Audience:

- Fleet Administrator
- Fleet Manager
- Garage Supervisor

Course Name: Advanced Fleet Management – FM2

Course Delivery: Classroom

Course Duration: 1 Day

Course Description: The Advanced Fleet Management course focuses on asset management, campaigns and recalls, standard jobs, fuel management, motor pool management and running reports. In the Asset Management lesson you will learn the unit disposal process. In the Campaigns & Recalls lesson, you learn about creating, customizing and finalizing a campaign/recall, and previewing work requests. The Standard Jobs lesson covers creating, updating, duplicating, and deleting standard job maintenance class codes and standard job technical specifications. The Fuel Management lesson discusses issuing fuel, viewing product information, and running the interface reject manager. In the Motor Pool Management lesson, you learn about the motor pool manager, assigning motor pool units, and maintaining motor pool rental classes.

Prerequisites: Basic Fleet Navigation-FM6, Fleet Management-FM1

Recommended Audience:

- Fleet Manager

Course Name: Inventory Management – FM3

Course Delivery: Classroom

Course Duration: 1 Day (Nashville Only)

Course Description: The Inventory Management course discusses inventory, purchasing, managing parts, and controlling inventory and bar coding. In the Part Management lesson, you learn about include viewing the part catalog, updating part warranties, create part cross references, creating and maintaining part bins, and managing inventory locations. The Inventory Purchasing & Replenishment lesson focuses on viewing part purchase orders, creating and approving part purchase requisitions. This section will also include transferring, receiving, issuing, and returning parts as well setting the part reorder points and adjusting inventory. In the Bar Coding lesson, you learn about creating bar codes for parts.

Prerequisites: Basic Fleet Navigation-FM6

Recommended Audience:

- Storekeeper
- Materials Manager
- Sign Shop Manager
- Sign Shop Worker

Course Name: Sign Shop Management – FM4

Course Delivery: Classroom

Course Duration: 1 Day (Nashville Only)

Course Description: The Sign Shop Management course discusses preparing for part fabrication, building stock and custom signs and running reports. In the Preparing for Part Fabrication lesson, you learn about the basics of components and how to work with them in preparation of part fabrication. The Workflow Processing – Building Stock Signs lesson includes every aspect of managing work orders including: creating a unit work order, adding jobs to work orders, adding labor and parts to work orders, viewing commercial charges, completing and closing a work order. The Workflow Processing – Building Custom Signs lesson discusses department work orders and how they are used to build custom signs.

Prerequisites: Basic Fleet Navigation-FM6, Inventory Management-FM3

Recommended Audience:

- Sign Shop Worker
- Sign Shop Manager

Course Name: Motor Pool Management – FM5

Course Delivery: Classroom

Course Duration: 1 Day

Course Description: The Motor Pool Management course discusses the role of the motor pool manager, vehicle pickup and return, and reporting. In the Motor Pool Manager lesson, you learn how to create and approve motor pool reservations. The Vehicle Pickup and Return lesson includes checking in and out of a motor pool vehicle.

Prerequisites: Basic Fleet Navigation-FM6

Recommended Audience:

- Fleet Manager Motor Pool

Course Name: Basic Fleet Navigation – FM6

Course Delivery: Web

Course Duration: N/A

Course Description: This online course offers Fleet users the ability to gain basic navigation and become familiar with FleetFocus (M5) functionality. This course prepares the user for FleetFocus prior to attending any required FleetFocus training classes.

Prerequisites: None

Recommended Audience:

- All FleetFocus Users

Course Name: Work Order & Fuel Management – FM7

Course Delivery: Classroom

Course Duration: 1 Day

Course Description: The Work Order & Fuel Management course focuses on managing work orders, viewing unit information, managing fuel transactions and running reports. In the Work Order Management lesson, learn about creating, updating, and closing work orders. The Display Vehicle Information lesson describes how to view a unit's information. In the Fuel Management lesson, learn how to enter and process fuel transactions at the agency level. In the Reports & Queries lesson, learn about searching for, and working with, work request and work order queries, dept/unit history queries, and unit product queries.

Prerequisites: Basic Fleet Navigation-FM6

Recommended Audience:

- Agency Fleet Administrators

Course Name: Equipment Timesheets – FM8

Course Delivery: Web

Course Duration: N/A

Course Description: This course covers the transactions used to process Equipment Timesheets. Users will gain an understanding of the process flows of the Equipment Timesheet functionality in the FleetFocus (M5) system, and will learn how to enter the applicable data on the timesheet for billing purposes.

Additionally, users will learn how to reconcile duplicate tag and serial number, and how to generate transactions from inventory results. In addition, this course provides instruction on entering and updating labor time cards, displaying vehicle information, and running queries.

Prerequisites: Basic Fleet Navigation-FM6

Recommended Audience:

- Equipment Timesheet Users

Course Name: Mechanic's Handbook – FM9

Course Delivery: Web

Course Duration: N/A

Course Description: This course covers the skills that mechanics need to learn in FleetFocus. Users will gain an understanding of the process flows for Workflow processing and be able to update work order information. Upon completion of this course, you will be able to update work orders, enter and update labor entries, display vehicle information and run queries.

Prerequisites: Basic Fleet Navigation-FM6

Recommended Audience:

- Mechanics

- GENERAL LEDGER -

Course Name: Journal Entry – Foundation – GL1

Course Delivery: Classroom

Course Duration: 1 Day

Course Description: This course provides an introduction to the General Ledger module, including: creating and modifying journal entries, inquiring on journals and ledgers, and running and viewing reports.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- Agency Finance Owner
- Agency GL Specialist
- Agency GL Inquiry

Course Name: Journal Entry – Advanced – GL2

Course Delivery: Classroom

Course Duration: 1 Day

Course Description: This course provides instruction on advanced journal entry in the General Ledger module, including: how to create reversing entries, processing imported journals, creating inter unit journals, and creating standard journals.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4, Journal Entry – Foundation-GL1

Recommended Audience:

- Agency Finance Owner
- Agency GL Specialist

Course Name: Understanding Chartfields – GL4

Course Delivery: Web

Course Duration: N/A

Course Description:

This course provides a general understanding of Edison Chartfields including: detail information that defines Chartfields, and how Chartfields are used in addition to providing examples. Learn how to find information about specific Chartfields and how to use the translation search function.

Prerequisites: Navigation

Recommended Audience:

- All Financials users

- GRANTS -

Course Name: Grants Management and Administration – GR

Course Delivery: Classroom

Course Duration: 2.5 Days

Course Description: This two and a half day course discusses how Agency personnel will use the system to create grant proposals, assigning projects and activities, creating the proposal budget, submitting a grant proposal and generating a grant award. Proposals are created online in the Grants Management module. Creating the proposal and award includes identify the basic information about the grant and the sponsoring organization. The basic accounting and billing setup is identified before the award is generated.

Agency personnel will learn how to use the system to manage grant awards. Awards will be managed online in the Grants Management module. Managing a grant award includes functions such as, updating budgets, dates, resources, as well as billing and accounting information. Managing the award includes touch points to other areas of the system such as Commitment Control, Customer Contracts, Project Costing as well as Billing and Accounts Receivable. This course will discuss these touch points for ongoing maintenance as well as for updates

This course also discusses how Agency personnel will use the system to manage grant accounting. The grant accounting and administration will be managed online in the Grants Management module. This course will cover the life cycle of a transaction and the different stages that it goes through in order to be billed, sent to the general ledger and back to project costing for the final reconciliation. It not only deals with expenses but also the revenue entries. In addition, it will cover no cost extensions, carry forwards, creating letters of credit, processing a general ledger journal, pre-award spending as well as interagency work.

Prerequisites: Navigation, Understanding Chartfields

Recommended Audience:

- Agency Fiscal Office
- Agency Billing Specialist
- Agency Fiscal Office Contract Administrator
- Agency Billing Authority
- Agency Fiscal Office
- Agency Program Director
- Agency Program Contract Administrator
- Agency Program Staff

- INVENTORY -

Course Name: Basic Order Fulfillment – INV1

Course Delivery: Classroom

Course Duration: ½ Day (Nashville Only)

Course Description: The course demonstrates the processes involved in picking inventory and recording the picking results using Edison as well as preparing items for shipping. The course will also cover how to transfer inventory items between storage locations. Finally, it will demonstrate a variety of methods to view inventory levels.

Prerequisites: Navigation-NAV99

Recommended Audience:

- Fulfillment Specialists
- Material Managers
- Anyone involved in picking and stock transfers

Course Name: Inventory Receiving – INV2

Course Delivery: Classroom

Course Duration: 1 Day (Nashville Only)

Course Description:

This course deals with four aspects of inventory receiving using the Edison Inventory module. The course will demonstrate how to verify receiving items and change the status of items with inspection requirements. The course will also deal with put-a-way plans as well as processing put-a-ways. Assigning inventory status and entering stockroom feedback will also be covered. The course will demonstrate how to define put-a-way options as well as how to view inventory levels.

Prerequisites: Navigation-NAV99, Receipts / RMA / RTV-PO3

Recommended Audience:

- Material Managers
- PO/Stock Receivers
- Warehouse Receivers
- Any one involved in putting stock away or in receiving inventory stock

Course Name: Inventory Management – INV3

Course Delivery: Classroom

Course Duration: 1 ½ Days

Course Description:

This course deals with seven aspects of managing inventory using the Edison Inventory module. The course will demonstrate how to perform inventory counts and replenish inventory. It will also cover how to manage stock requests. The course will demonstrate how to review inventory levels and transactions. It will also cover inventory accounting and setting up inventory storage locations. Finally, the course will cover running the Surplus Property Inspection Request.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- Fulfillment Managers
- Materials Managers
- Warehouse Workers
- Inventory Buyers
- Anyone who must manage inventory stock requests, replenishments, or inventory counts

Course Name: Using a Bar Code Scanner – INV4

Course Delivery: Classroom

Course Duration: ½ Day (Nashville Only)

Course Description:

This course introduces how hand held scanners using High Jump software can be used to perform basic inventory functions. The course covers the basic functionality of the scanner including how to log on to the scanner. It also covers how the scanner can be used to make inquiries, receive purchase orders, prepare shipments, carry out bin to bin transfers, and perform picking and put-a-ways. It also covers how the scanner can be used to perform cycle counts.

Prerequisites: Navigation-NAV99

Recommended Audience:

- Anyone who will be using a hand held scanner and High Jump software to perform basic inventory functions.

- PLANT MANAGEMENT -

Course Name: Work Management Processing – PM1

Course Delivery: Classroom

Course Duration: 2 Days

Course Description:

The purpose of this course is to provide the State of Tennessee employees involved in maintenance activities an understanding of the FacilityMAX Work Order Management Process.

Customer Requests for maintenance related activities are electronically processed into the system. Once the request information is captured, the requests can then be approved and promoted into actual work orders, rejected and retained in the system as being rejected, or there can be no action and the request records can either be approved or rejected at a later date.

Once a valid Work Order has been created in the system, resources are assigned and managed in the system throughout the life of the Work Order through the use of Status Codes.

Upon completion of all related work and financial transaction posting against the Work Order Phases, the Work Order Status code is changed to indicate that all work has been completed.

Prerequisites: PM10 – Basic Facilities Management Navigation (online)

Recommended Audience:

- Facility Admin.
- Facility Supervisor
- Maintenance Planner
- Project Manager
- Project Estimator
- Shop Supervisor
- Plant Timekeepers
- Plant Timecard Approvers

Course Name: Project Management & Administration – PM2

Course Delivery: Classroom

Course Duration: ½ Day

Course Description:

The purpose of this course is to provide an understanding of the FacilityMAX Project Management process for major and minor maintenance projects.

This course will describe the Project Types that have been defined in the system and the Project Status Codes that have been associated to each Project Type.

The course will also describe the procedures and processes required to create and manage major and minor maintenance projects.

Prerequisites:

- PM01 – Work Order Processing – (Classroom)
- PM09 – Customer Request Processing – (Web)
- PM10 – Basic Facilities Management Navigation – (Web)

Recommended Audience:

- Project Estimator
- Maintenance Planner
- Project Manager
- Project Accountant

Course Name: Contract Management – PM3

Course Delivery: Classroom

Course Duration: 1 Day

Course Description:

The purpose of this course is to provide an understanding of contract management processes within the FacilityMAX Contract Administration module. This module details general contract administration, service contract administration, and project contract administration.

The Service Contract screen is used to define service contracts in the system. These types of contracts are generally for maintenance/repair works that is not tied to a specific project. Once defined here, the contract can be tied to a work order phase.

The Project Contract screen is used to define project contracts in the system. Work Order Phases and Projects are attached to the Project Contract as Line Items in detail.

Prerequisites:

- PM01 – Work Order Processing – (Classroom)
- PM09 – Customer Request Processing – (Web)
- PM10 – Basic Facilities Management Navigation – (Web)

Recommended Audience:

- Agency Buyers
- Administrative Assistants
- Facility Supervisors
- Facility Administrators.

Course Name: Assets, Equipment & Preventative Maintenance – PM4

Course Delivery: Classroom

Course Duration: 1 Day

Course Description:

The purpose of this course is to provide an understanding of the FacilityMAX Assets, Equipment, and Preventive Maintenance Management Process

Prerequisites:

- PM10 – Basic Facilities Management Navigation – (Web)

Recommended Audience:

- Equipment Rental Manager
- PM Maintenance Planner
- PM Warehouse Supervisor
- Facility Administrator
- Facility Supervisor

Course Name: Property Administration & Lease Administration – PM5

Course Delivery: Classroom

Course Duration: 1 Day

Course Description:

The purpose of this course is to provide an understanding of FacilityMAX Property Administration.

Property management involves creating and maintaining a database of property records. Property management also includes functions for deed and tract management as well as insurance valuation of the property and its contents.

Properties defined in this module are part of the four-tiered location hierarchy of region, facility, property and location, widely used throughout the system in modules such as Work Management, Inventory, Asset Management, Equipment, Lease management and Contract Administration.

Lease Management includes both payable and receivable leases, so you can manage properties that you lease as well as properties that you lease to others.

Prerequisites:

- PM10 – Basic Facilities Management Navigation – (Web)

Recommended Audience:

TBD

Course Name: Finance & Purchasing – PM6

Course Delivery: Classroom

Course Duration: ½ Day

Course Description:

This course provides the State of Tennessee employees involved in maintenance activities with an understanding of the FacilityMAX Finance Module functionality.

The course begins with an overview of the Finance Module functionality and the types of Subledger account types that exist in the system. The Finance Module Setup and Configuration Screens are discussed in detail to provide a comprehensive understanding of system settings and Finance Module functionality.

The FacilityMAX External Charges, Account Journal Entries, and Work Order Journal Entries are presented to provide a general understanding of the processes for posting those types of financial transactions into the system.

Prerequisites:

- PM10 – Basic Facilities Management Navigation – (Web)

Recommended Audience:

- Agency Card Holders
- Agency Admin. Assistants
- Fiscal Billing Coordinators

Course Name: Estimating – PM7

Course Delivery: Classroom

Course Duration: ½ Day

Course Description:

The FacilityMAX Estimating course covers the topics of formal estimating procedures and Job Order Contracting Management.

The FacilityMAX Estimating module allows you to determine the specific commitments of manpower, materials, equipment, time, money, and the operational sequence of performing the job. Estimating includes four major processes:

- Defining the elements of an estimate: Crews, Price Books, and other resources
- Estimating the number of labor hours required for each phase
- Determining the amount of materials and equipment required for each phase
- Calculating the total estimated costs for the work to be completed

Estimating is always based on definitions of work set up in a Price Book. These values are used to populate an estimate for a work order phase in the Estimate Entry screen.

Prerequisites:

- PM10 – Basic Facilities Management Navigation – (Web)

Recommended Audience:

- Estimators
- Facility Supervisors
- Maintenance Planners
- Project Estimators
- Project Managers

Course Name: Utility Management – PM8

Course Delivery: Classroom

Course Duration: ½ Day

Course Description:

The purpose of this course is to provide an understanding of FacilityMAX Utility Management.

Utility Management involves creating and maintaining a database of utility meters and vendors as necessary to support entering commercial utility bills for interface to an Accounts Payable system, and for entering transactions to track utility cost by business unit.

Prerequisites:

- PM6 – Finance & Purchasing
- PM10 – Introduction to FacilityMAX

Recommended Audience:

- Fiscal Billing Coordinator
- PM Accounts Payable Clerk

Course Name: Customer Requests – PM9**Course Delivery:** Web**Course Duration:** 1 hour

Course Description: The purpose of this course is to provide an understanding of the FacilityMAX Customer Request process.

Customer Requests for maintenance related activities are electronically processed into the system. Once the request information is captured, the requests can then be approved and promoted into work orders, rejected and retained in the system for tracking, or there can be no action and the request records can either be approved or rejected at a later date.

Prerequisites: PM10 – Introduction to FacilityMAX**Recommended Audience:**

- Any State employee with a need to submit a request for services to an agency that uses FacilityMAX as a work management tool.

Course Name: Introduction to FacilityMAX – PM10**Course Delivery:** Web**Course Duration:** ½ Day

Course Description: The purpose of this course is to provide State of Tennessee employees basic familiarization with the icons and methods used to navigate within FacilityMAX.

FacilityMAX is a web based application that can be accessed from any web browser. It uses navigation techniques that are intuitive and common to many websites. This course will teach the user the broad overview and some key details about navigating within FacilityMAX.

Prerequisites: None**Recommended Audience:**

- Any State Employee that will use FacilityMAX as a work management tool.

Course Name: Plant Inventory – PM11

Course Delivery: Classroom

Course Duration: 1 Day

Course Description:

The purpose of this course is to provide an understanding of FacilityMAX Inventory module.

The Inventory module is used to define and classify inventory parts. It maintains characteristics – such as location, average cost, quantity on hand, quantity committed, and vendors – all becoming part of its inventory part record. Warehouses and warehouse bin definitions in the system are created through the Inventory module. Inventory part quantities are updated and adjusted here as well. All information will be entered once, and it will be used everywhere in FacilityMax with the appropriate security settings.

Prerequisites:

- PM10 – Introduction to FacilityMAX

Recommended Audience:

- Central Purchasing Buyer
- Facility Administrative Assistant
- Agency Asset Manager
- Agency Buyer
- Agency Payment Card Holder
- Equipment Rental Manager
- Warehouse Worker

Warehouse Supervisor

- PROJECTS -

Course Name: Creating and Managing Projects & Activities – PR

Course Delivery: Classroom

Course Duration: 2 Days

Course Description: This course covers how Agency personnel will use the Edison System to add projects and activities for internal as well as external billing. This course also covers budgetary creation for the project and activity. For the majority of the agencies project and activities will be added manually into Project Costing. Budgets will also be created and sent to commitment control. For external billings a customer contract will be set up to handle the customer information, as well as the billing and revenue entries.

In addition, you learn how Agency personnel will use the Edison System to manage projects and activities. Project level information can be modified at any time to reflect current business needs. Managing projects and activities includes updating dates, budgets, locations, issues, deliverables, descriptions, as well as accounting transactions. Online inquiry pages as well as queries can be used to track projects and activities and their associated data.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- Agency Project Admin
- Agency Project Budget Admin
- Agency Project Budget Manager
- Agency Project Supervisor or Director

- PROCUREMENT – CONTRACTS -

Course Name: Supplier Contract Management – CN1

Course Delivery: Classroom

Course Duration: ½ Day

Course Description: This course covers how State employees will use the Edison system to creation supplier contracts and documents. Learn how to create and collaborate on these documents and search for Contract library elements. Finally, learn the approval process for contracts and documents.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- Agency Contract Administrators or those persons responsible for contract management at the agency level.
Central Purchasing Buyers
- Contractual approvers
- Event collaborators or any person who might provide input on a document

Course Name: Working with Ad Hoc Documents – CN2

Course Delivery: Web

Course Duration: N/A

Course Description:

This course covers how State employees will use the Edison system to enter Ad Hoc Documents for supplier contracts. Learn how to create and collaborate on these documents and search for Contract library elements.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- Event buyers and event sellers who will use contract language when creating events
- Event collaborators or any person who might provide input on a document

- PROCUREMENT -

Course Name: Requisitioning and Receiving – ePro1

Course Delivery: CBT

Course Duration: N/A

Course Description: This course is intended for Requesters who will enter basic Requisitions for goods and services using the Edison eProcurement module and receivers who will create receipts using the Edison Purchasing module. Requesters will learn to create Requisitions by searching Catalogs for items and services, creating special requests, and connecting directly to contracted vendor websites to select contract items. This course also describes how Requester can manage and print their own Requisitions, as well as, create and manage their own favorites list and personal templates. Receivers will learn how to create basic Receipts, use additional receiving functionality and cancel existing Receipts and Receipt Lines.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- **Agency buyers:** Any agency employee authorized to create Requisitions, approve within their limits, authorized to process agency Requisitions, dispatch, and receive as defined by their agency policies
- **Agency requesters:** Any agency employee who creates Requisitions with the lowest level of approval and processing capability.
- **Central Purchasing Buyers:** Any State employee who creates Requisitions and is authorized to process Requisitions and Purchase Orders within the limits that procurement policy dictates which can include dispatching, receiving, change orders, cancellations, etc.
- **Desktop Receivers and Core Purchasing Receivers:** Any Agency or Purchasing employees authorized to process their own Receipts or for others whom they are authorized.
- **Inventory Buyers:** Inventory users who are designated to perform warehouse replenishment functions.

Course Name: Advanced Requisitioning – ePro2

Course Delivery: Classroom

Course Duration: ½ Day

Course Description:

This course is intended for advanced Edison and plant Requesters who will enter Complex Requisitions for goods and services. Requesters will learn advanced functions for using P-Cards as payment, creating “description only” Requisitions, re-opening Requisitions, and printing batches of Requisitions. This course also describes how Requesters can change Requisitions after they have been sourced and dispatched to the Vendor.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4, Requisitioning-ePro1 (CBT)

Recommended Audience:

- **Agency buyers** or any agency employee authorized to create requisitions, approve within their limits, authorized to process agency requisitions, dispatch, and receive as defined by their agency policies
- **Central Purchasing buyers:** Any State employee who creates Requisitions and is authorized to process Requisitions and Purchase Orders within the limits that procurement policy dictates which can include dispatching, receiving, change orders, cancellations, etc.
- **Plant Requestors** who create plant specific requisitions.
- **Inventory Buyers** who will replenish Inventory using Express Requisitions.

Course Name: Buyer Requisitioning – PO1

Course Delivery: Classroom

Course Duration: 1 ½ Days

Course Description:

This course is intended for Edison buyers who will load, edit, and source Requisitions for fulfillment in the Edison Purchasing module, as well as, use the Edison eProcurement module to source Requisitions. These buyers will learn how to load and correct purchasing requests into the Edison Purchasing module for various applications. Once loaded, this course will teach buyers to edit, manage, and inquire on requisitions. Included are different processes to source requisitions for fulfillment and how to correct requisitions sourced incorrectly. The processes covered will show buyers how to source individual Requisitions or batch amounts of requisitions.

Prerequisites: Navigation-NAV99, Requisitioning-ePro1 (CBT)

Recommended Audience:

- **Agency/Facility/Plant Buyers** responsible for managing inventory and plant/fleet items
- Central Purchasing Buyers
- Inventory Buyers
- FMax/M5/Peoplesoft Developers

Course Name: Core Purchase Orders – PO2

Course Delivery: Classroom

Course Duration: 1 Day

Course Description:

This course focuses on Purchase Orders within the Edison Purchasing module. This course is intended for Edison users who will create, modify, and manage Purchase Orders. Users will learn to create, edit, and manage Purchase Orders. They will also learn to dispatch Purchase Orders to the Vendor for fulfillment and create changes to Purchase Orders which have already been dispatched. Additionally, this course will describe how users can inquire on Purchase order information, history, and activity and run Purchase Order Reports.

Prerequisites: Navigation-NAV99, Requisitioning-ePro1 (CBT)

Recommended Audience:

- Agency Buyers
- Central Purchasing Buyers
- PO Approvers who have authority to approve purchase order transactions at varying amount or type of transaction/commodity/funding levels
- Agency/Facility/Plant Buyers responsible for managing inventory and plant/fleet items

Course Name: Receipts / RMA / RTV – PO3

Course Delivery: Classroom

Course Duration: ½ Day

Course Description:

This course is intended for Receivers and Inspectors who fulfill Purchase Orders and perform returns to vendors (RTV). The functionality of this course is within the Edison Purchasing module. The Receiver will be taught how to create, view, and manage RTV's and Receipts. Additionally, users will view supporting procurement information such as Purchase Order, Receipt, and Voucher information.

Prerequisites: Navigation-NAV99, Requisitioning-ePro1 (CBT)

Recommended Audience:

- Inspectors who inspect goods/materials received
- Core purchase order receivers, who receive goods and services, create receipts, cancel receipts, inspect, and enter receiving details

Course Name: Requisition and Purchase Order Approvers – PO4

Course Delivery: Web

Course Duration: N/A

Course Description:

This course is intended for Requisition and Purchase Order approvers. These Approvers will learn to approve and deny Requisitions and Purchase Orders using their Worklist, as well as, route their Workflow to other Approvers. The course also teaches Approvers how to inquire on individual Requisitions and Purchase Orders and how to run reports.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- **Requisition Approvers** who have authority to approve Requisition transactions at varying amount or type of transaction/commodity/funding levels.
- **PO Approvers** who have authority to approve purchase order transactions at varying amount or type of transaction/commodity/funding levels.

Course Name: Services Procurement – SP1

Course Delivery: Classroom

Course Duration: 2 Days

Course Description:

This course is designed for personnel who source, fill, and monitor the services procurement process. Included in this course are methods to enter and route Requisitions for resource and deliverable-based services. Users will also learn how to manage bids, interview candidates, create and manage Invoices, create and manage expense reports and timesheets.

Note: Initially, this course will be specifically for ITPro Services and will become available later to other service procurement employees, such as: temporary office support.

Prerequisites: Navigation-NAV99, Understanding Chartfields-GL4

Recommended Audience:

- Administrators who manage the services procurement module
- Service Coordinators who process approved Requisitions, source those Requisitions, and review and approve timesheets
- Service Requesters who create and maintain Requisitions for services
- Invoice Managers who create, maintain, and print service Invoices
- Approvers who have authority to approve Requisitions, Purchase Orders, Work Orders, Expense reports, Timesheets, and Invoices at varying amounts or types of transaction/commodity/funding levels

Course Name: Services Procurement for Vendors – SP2

Course Delivery: Web

Course Duration: ½ Day

Course Description:

Suppliers will use the Edison Supplier Portal as the gateway for communicating with the State regarding contingent service contracts. This course will teach Suppliers how to maintain Service Provider and Service Provider Contact information, as well as, how to add new Service Providers. This course also teaches how to view Work Orders, enter Timesheets, enter Expenses, and approve Invoices.

Prerequisites: Navigation-NAV99

Recommended Audience:

- External service coordinators who manage processes for the supplier
- External independent service providers who are suppliers registered with the State who act as and manage the processes and provide the service
- External service provider contacts who can log time or progress, respectively, against the work order
- External service providers who provides services for the State
- Service coordinators who will work with external service provider contacts and service requesters to fill approved service requisitions

Course Name: Strategic Sourcing – SS1

Course Delivery: Classroom

Course Duration: 2 Days

Course Description:

This course will demonstrate to the user the process for creating a solicitation event within Edison. This includes analyzing and awarding the particular event. Additionally, the learner will learn functionality within the module that will allow them to request collaboration on a particular event being created, process notifications for bidders regarding the event, and review any history of bidding.

Prerequisites: Navigation-NAV99, Working with Ad Hoc Documents-CN2

Recommended Audience:

- **Event Buyers:** Any agency employee authorized to create, approve, and process sourcing events
- Event Approvers
- Event Collaborators
- **Central Purchasing Buyers** in DGS Central Purchasing responsible for statewide bidding/award and processing agency requisitions

Course Name: eSupplier Training – SS2

Course Delivery: Web

Course Duration: N/A

Course Description:

PeopleSoft eSupplier Connection is a self-service web application that features employee-facing (internal) and supplier-facing (external) transactions that enable your suppliers to view and modify their own business information at their convenience, as well as, the ability to review purchase order, receipt, invoice, payment and account balance information.

Prerequisites: Navigation-NAV99

Recommended Audience:

- Suppliers
- Buyers

- REPORTING & AGENCY TECHNICAL SUPPORT -

Course Name: Running Existing Reports and Queries – TH1

Course Delivery: Web

Course Duration: N/A

Course Description: This course explains how users can run existing queries and reports. Users will learn how to run three different types of reports: Crystal, SQR, and PS/nVision. For the nVision reports, the tools DrillDown and Report Scopes will be discussed in detail.

Reports contain predefined and formatted (headers, footers, column titles, etc.) information. Queries allow a person to extract information without having to write Structured Query Language (SQL) statements and the information can be easily be downloaded to Excel.

Prerequisites: Navigation-NAV99

Recommended Audience: Agency Personnel required to run existing reports.

NOTE: Reports and Queries specific to the subject matter of courses are taught within those courses.

Course Name: Agency Technical Support – TH2

Course Delivery: Invitation Only

Course Duration: 1 Day

Course Description:

PeopleSoft Query is a reporting tool. This course explains the basic concepts of selecting data, designing and running simple & complex queries. With PeopleSoft Query, users can extract the precise information that they are looking for by using visual representations of the PeopleSoft database. In this course, users will learn about the different features of PeopleSoft Query. They will learn how to create basic and advanced queries, and how to use the selection criteria to further filter/refine the queries.

Prerequisites: Navigation-NAV99, Running Existing Reports & Queries-TH1

Recommended Audience: Agency Technical Resource

- TRAVEL & EXPENSES -

Course Name: Working with Travel, Expenses & Car Reservations – TV1

Course Delivery: Web

Course Duration: N/A

Course Description: This course covers how State employees will use the Edison System to prepare travel authorizations, cash advances and expense reports. Students will learn how to view and track status of expense reports and calculate point to point mileage.

Prerequisites: Navigation-NAV99

Recommended Audience:

- Employees who travel on State of Tennessee business.
- Employees who approve travel for State of Tennessee business.

Course Name: Travel Administration – TV2

Course Delivery: Classroom

Course Duration: 1 Day

Course Description:

This course covers how Agency personnel will use the Edison System to review and modify accounting transactions, process expense transactions, and approve travel expenses related to employee travel. In addition, this course will cover how Commitment Control is used for budget checking expense transactions, and review financial reports available to monitor expenses.

Prerequisites: Navigation-NAV99, Working with Travel, Expenses and Car Reservations-TV1

Recommended Audience: All employees who approve travel related transactions (such as, expense reports, cash advances, etc.)